Capture Management

Case Study

summit

Summit Consulting Gains Data Transparency & Positions for Sustained Growth with Help from TechnoMile

TECHNOMILE

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2003
Founded

Washington, D.C.
Headquarters

110
Company Size

Advisory Consulting and Services
Industry

Founded in 2003, Summit Consulting is a specialized advisory firm headquartered in Washington, D.C. with a mission centered on delivering data-driven solutions to help make government effective and society just. For two decades, Summit has provided a wide range of federal agencies and private-sector companies with expertise in economics, statistics, and analytics to implement quantitative and qualitative solutions that turn data into actionable intelligence. Summit's partners, directors, and bench of world-leading economists and econometricians lead teams in four core areas: federal infrastructure finance, loans, and grants; evidence-based program evaluation; program and business modernization; and enforcement and litigation analytics.

Time for a CRM Upgrade

In 2022, Summit found itself needing to upgrade its CRM system to better serve the needs of both the company's CRM users and its growing business. Explains Antonia Baker, Business Development and Marketing Coordinator at Summit Consulting, "We were using another CRM, which we'd customized to meet Summit's needs. But the constant complaint from staff was how slow the system was. We also lacked transparency in our opportunity data. Everything was stored in the CRM, but when we wanted to run reports or analytics, we had to export the data out of the system and work with it in a separate application – it was very cumbersome. Because of these challenges, our staff resisted using it, causing the information in the system to become outdated, and ultimately, it wasn't a trusted source of information."

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A Robust, Scalable Solution

With their legacy CRM's contract end date approaching, the Summit team kicked off their search for a new solution to support the organization's business development and capture tracking. Says Baker, "We knew we wanted a CRM that was specifically designed for government contracting. Ease of use for our staff was a high priority and we needed to be able to quickly and easily report and create dashboards right from the system."

However, Summit also had more strategic business objectives in mind as they approached their CRM selection process. Explains Kate Lynch Machado, Director of Client Development at Summit, "We're a small company that's growing into a mid-size firm. As we're evolving, we have a big focus on what we call 'Summit 2.0.' We know we're building towards the next version of Summit and what it will look like in a competitive landscape that includes mid-size firms as opposed to small businesses. So, when considering CRMs, we were seeking a scalable solution that we could grow into – a system with robust features that offered new ideas for managing BD and capture, even if we didn't use every capability right from the start."

GovCon Expertise & Data Transparency

Summit evaluated a handful of CRM providers, including TechnoMile, which had been recommended by one of the company's vendors. In the end, Summit decided on TechnoMile's Growth Suite, a CRM solution that's purpose-built for selling to the federal government. It's deployed into a company's Salesforce or Microsoft Dynamics environment, layering on unique features and capabilities required by government contractors. Says Machado, "We liked that TechnoMile's Growth Suite was designed and deployed by people who understand government contracting – its cycles, the terminology, and how to incorporate this into the system. We could see ourselves moving towards Summit 2.0 – and beyond – with Growth."

The Summit team also saw a clear path to the company's desired data transparency with Growth. Adds Baker, "In meetings, we're always getting questions like 'how many proposals did we put in?' or 'how many small business opportunities are we pursuing?' With Growth, we'd have quick and easy reporting on whichever opportunity metrics were of interest internally."

Fine-Tuning a Best Practices Framework

With its CRM selection made, Summit pulled together a sub-team that was responsible for working with TechnoMile to get its new Growth solution up and running. "We had a positive implementation experience. It was great that out of the box, Growth was an easy system to digest. From there, we fine-tuned it for Summit's data requirements and how we want to assess opportunities," recalls Machado.

The framework of capture best practices that Growth provides was also useful. "As we were trying to figure out which parts of TechnoMile's solution we wanted to initially use, we'd review fields and corresponding drop-down selections available out of the box and then want to dialogue about 'why capture this data, this way?' with the TechnoMile team. In some cases, we were managing a process differently, so it was great to be able to talk with TechnoMile about why Growth was designed a certain way. Having 'industry-standard' as the starting point in the product helped the Summit team think through whether we wanted to move that direction or stay where we are."

Data People at Heart

In mid-2023, Summit went live with its TechnoMile solution. "Growth was well received when we rolled it out to our staff. It's a much more polished-looking platform, it's much faster, and everybody commented on the ease of use – despite having to capture more information about their opportunities than before," says Baker. Adds Machado, "I think our team was really engaged because at Summit, we're all data people at heart. So, the team understood the importance of standing up and using our new CRM in a consistent way so that the data would be strong. We were also really thoughtful about the opportunity data we decided to collect. We were thinking about Summit 2.0 and maybe even 3.0 – as we continue to grow, what are we going to need? We're feeling well-equipped for the future!"

A Central Source of Truth

With Growth in place, Summit has a single, centralized source of truth about its opportunities that helps its teams successfully coordinate. Shares Baker, "Having a central source of truth was a key theme when we were planning for Growth. Before, there was not an integrated system where we tracked Bid/No Bid decisions, proposal requirements, schedules, etc. As we continue to adapt and leverage the tool more, we hope Growth will become our central repository for everything related to each opportunity. It will be the place that staff go to keep their teams running around an opportunity – for coordination, transparency into communication and call plans, so that everyone knows what's going on and we don't drop the ball."

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Bid/No Bid Insights

One of the biggest wins for Summit has been systemizing its Bid/No Bid tracking and analytics in Growth. "One thing we wanted to focus on in 2023 was formalizing our Bid/No Bid practice and leveraging TechnoMile to be a system of record," shares Baker. "This allows our team to consistently record our Bid/No Bid decisions based on several areas we're measuring – such as core competencies and home turf – and capture relevant notes. This has given us great insight into whether we're in line with what we've defined as our competencies and home turf and allows us to consider this when we're assessing new opportunities."

Informed Workforce Planning

Workforce planning is another area where the data captured in Growth is helping Summit make better business decisions. Explains Machado, "We found we needed a workforce planning sub-team across our firm to project out staffing and recruitment requirements. We're using data from Growth like Pwin, timeframe, and competencies of interest and about eighteen months out, we're looking at what kind of work will be required if we win – for example, what are the required data analytics pieces and will certain software be needed? It gives us a sense of direction about where we're going as a firm and what our staffing needs will be like. This, in turn, allows our People Ops team to start thinking about recruitment needs and where they need to do outreach."

Improved Forecasting Accuracy

Growth's Pwin calculator and forecasting capabilities have also been beneficial tools for Summit. Says Machado, "It was nice to have the foundation with best practices from Shipley that TechnoMile's Pwin calculator provided. We took that and simplified it a bit to better align to Summit's needs. Now we're pulling the data with Pwin adjustments into our pipeline review to be able to forecast. Pwin is an area we're exploring more and more to be able to accurately project revenue out as a firm and understand what our dollars look like going into next year if we win certain opportunities."


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A Partnership for the Future

The Summit team recognizes they're just at the beginning of their TechnoMile journey and are already thinking about where they'll take their TechnoMile solution next to support the company's continued growth. Shares Baker, "As we wrap up this year, we'll hold an internal account management conference where we'll assess what we want to do better and improve upon next year. TechnoMile will definitely be a part of this discussion – how can we get better use out of the tool we've invested in? One area we want to explore is more automation to help remind and guide our team on what to do next or at different points in the sales cycle."

Machado adds, "We recently saw a demo of TechnoMile's Contract Lifecycle Management solution to get a sense of what happens when you win and move an opportunity out of Growth and how the system helps you manage that award. It was enticing! We're not quite ready for it yet, but it provided good insight into how we should be thinking about our post-award processes as we move Summit towards the future and greater maturity – and how TechnoMile can serve as our partner to help us get there faster!"

About TechnoMile

From go-to-market to contract closeout, TechnoMile provides transformative cloud solutions that empower companies to find, pursue, win, and retain more business with the government. With our best-in-class cloud platform, companies optimize BD and capture processes, gain unique competitive insights, source contact intelligence, automate and de-risk the contract lifecycle, and gain an information advantage that elevates enterprise performance.
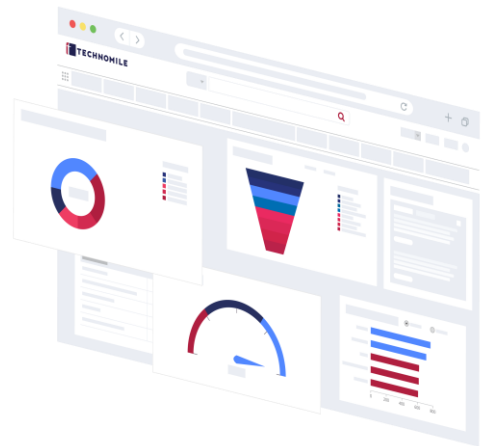
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